Steps For Entering Union (Organization) Dues In EPIC

To enter union/organization dues or a parking fee document in EPIC:

1. At the EPIC Navigation window, select *Payroll Document* at the New Documents menu. An alphabetic list appears.

2. Select *Union Dues >* *[applicable dues transaction]* .

3. At the menu bar, select *Edit > Add New Document*. The applicable window is displayed.
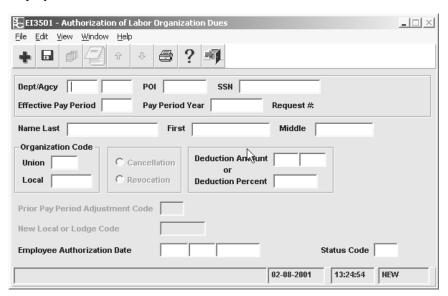

Figure 1a. Union Dues window (authorization, change, cancellation, revocation, or mass change)

4. Complete the fields as indicated under **Union Dues Window Field Instructions**.

5. After completing the fields, select *File > Save*. The Save Changes pop-up appears.

6. Click **[Yes]** to save the entries and exit the action.

                    OR

    Click **[No]** to exit the window and not save the entries.

                    OR

    Click **[Cancel]** to reopen the window.

EPIC Union Dues Window Field Instructions

The Organization Dues window (**Figure 1a**) is used to enter organization dues data. For instructions on the entry process, see **Steps For Entering Union (Organization) Dues**.

Organization Code
The union/association and local codes.

Union
Type the union/association code to be established, changed, or canceled/revoked in the database. Verify the union/association code by accessing IRIS Program IR308.

Local
Type the local code to be established, changed, or canceled/revoked in the database.

Cancellation/Revocation
Click the applicable radio button to indicate a cancellation or revocation. The system default is cancellation.

For **cancellations**, deductions are withheld for the effective pay period entered and stop the following pay period.

For **revocations**, the union/association has an established revocation−eff−code in TMGT; the dues stop the pay period of the authorized revocation date as established in TMGT, Table 010.

Deduction Amount
Type the amount to be deducted each pay period for membership dues in dollars and cents if the deduction is based on a specific amount. No entry is necessary if the deduction amount is established in TMGT.

OR

Deduction Percent
Type the percent to be deducted each pay period for membership dues in whole numbers and two decimal places if the deduction is based on a percentage. No entry is necessary if the percent amount is established in TMGT.

Note: Do not enter both a deduction amount and a deduction percent.

Prior Pay Period Adjustment
Type **9** if deductions were made in error or if cancellation notification was received after the revocation date; otherwise, leave blank.

New Local or Lodge Code
Type the code for the new local or lodge for the transfer.

Employee Authorization Date
Type the date the employee authorized the membership dues deduction.

Steps For Entering Union (Organization) Dues In *EmpowHR*

To enter union/organization dues in *EmpowHR*:

1. On the *EmpowHR* main window, select the **Payroll Documents** menu group.

2. Click the **Union Dues** component. The Find An Existing Value tab - Union Dues page allows the user to locate an existing employee in order to enter or change union dues. Enter the search criteria.

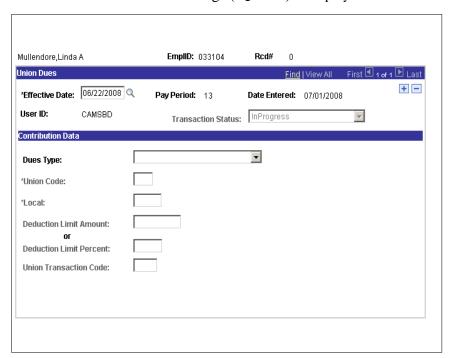3. Click **Search**. The Union Dues Page (**Figure 1b**) is displayed.

Figure 1b. Union Dues page

4. Complete the fields as indicated under ***EmpowHR* Union Dues Page Field Instructions**.

5. Click **Save** to save the transaction.

6. Click **OK** on the pop-up. At this point the following options are available:

Step	Description
Click **Return To Search**	To enter an additional transaction.
Click **Notify**	To send an email to the next individual in the workflow.

EmpowHR Union Dues Page Field Instructions

The *EmpowHR* Union Dues page (**Figure 1b**) is used to enter organization dues data. For instructions on the entry process, see **Steps For Entering Union (Organization Dues) In *EmpowHR***.

Name	This field is populated from the search criteria. The name of the employee is displayed from the EmplID entered.
EmplID	This field is populated from the search criteria entered.
Rcd#	This field is the number of records for that employee.
*Effective Date	This is the date on which a table row becomes effective; the date that an action begins. This date also determines when to view or change information. This field is populated with the beginning date of the current pay period. Select a date from the calendar icon to change the default date.
Pay Period	This field is populated and cannot be changed.
Date Entered	This field is populated and cannot be changed.
User ID	This field is populated with the system identifier for the individual who generates the transaction. The name is also displayed.
Transaction Status	This field defaults to `In Progress` and cannot be modified.
Dues Type	Select the applicable dues type from the drop-down list. The valid values are as follows:

Dues Type Valid Values	Description
083	Dues Change
084	Change Between Locals
085	Cancel
086	Enrollment

*Union Code   Enter the union/association code to be established, changed, or canceled/revoked in the database. Verify the union/association code by accessing IRIS Program IR308.

*Local   Enter the local code to be established, changed, or canceled/revoked in the database.

Deduction Limit Amount   Enter the amount to be deducted each pay period for membership dues in dollars and cents if the deduction is based on a specific amount. No entry is necessary if the deduction amount is established in TMGT.

OR

Deduction Limit Percent   Enter the percent to be deducted each pay period for membership dues in whole numbers and two decimal places if the deduction is based on a percentage. No entry is necessary if the percent amount is established in TMGT.

Note: Do not enter both a deduction amount and a deduction percent.

Union Transaction Code   Enter the applicable code.

* Field names that are preceded with an asterisk (*) are required fields. The user must enter data in these fields before proceeding.